

Asia-Pacific ERP Software Market By Deployment (On-premises, Cloud), By Organization Size (Small and Medium Enterprises (SMEs), Large Enterprises), By Business Function (Finance, Human Resource, Supply Chain, Customer Management, Inventory Management, Others), By Industry Vertical (Manufacturing, Retail, Healthcare, BFSI (Banking, Financial Services, and Insurance), IT and Telecom, Government and Public Sector, Education, Others), By Country, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Asia-Pacific ERP Software Market was valued at USD 12.96 Billion in 2023 and is expected to reach USD 29.68 Billion by 2029 with a CAGR of 12.59% during the forecast period.

Enterprise Resource Planning (ERP) software in the Asia Pacific region refers to integrated systems that help organizations manage core business processes, including finance, supply chain, human resources, and customer relations, all within a unified platform. The Asia Pacific ERP Software Market is witnessing significant growth, driven by the rapid digital transformation across various industries, where companies are increasingly adopting ERP solutions to enhance efficiency, optimize resource allocation, and gain real-time insights into their operations. This market's rise is further bolstered by the increasing presence of small and medium-sized enterprises (SMEs) that seek scalable and cost-effective ERP solutions to stay competitive. Additionally, the shift from

on-premises to cloud-based ERP solutions is a critical factor contributing to market expansion, as cloud offerings provide flexibility, lower upfront costs, and ease of access across geographies. Industries such as manufacturing, retail, healthcare, and financial services are at the forefront of ERP adoption, driven by the need to manage complex operations and meet evolving regulatory requirements. Furthermore, government initiatives promoting digitalization and smart cities, especially in countries like China, India, and Japan, are accelerating the deployment of ERP systems across various sectors. The market is also benefiting from advancements in technologies such as artificial intelligence, machine learning, and data analytics, which are being integrated into ERP systems to provide predictive insights and automate decision-making processes. The increasing need for real-time data access and the ability to adapt quickly to market changes are pushing organizations towards adopting modern ERP systems, which are essential for staying agile in a highly competitive business environment. As businesses continue to recognize the strategic importance of ERP in driving growth and innovation, the Asia Pacific ERP Software Market is expected to see sustained growth, making it a vital component of the region's broader digital economy landscape.

Key Market Drivers

Rapid Adoption of Digital Transformation Across Industries

The Asia Pacific Enterprise Resource Planning Software Market is experiencing robust growth due to the rapid adoption of digital transformation across diverse industries. Digital transformation, which involves integrating digital technologies into all aspects of business operations, is becoming a critical strategy for companies aiming to enhance efficiency, competitiveness, and customer satisfaction. In the Asia Pacific region, organizations are increasingly recognizing the need for advanced technological solutions to streamline their processes and drive growth. Enterprise Resource Planning software is at the forefront of this transformation, offering a comprehensive solution that integrates various business functions into a single unified system.

Digital transformation is particularly crucial in industries such as manufacturing, retail, healthcare, and financial services, where operational efficiency and data accuracy are paramount. For instance, in the manufacturing sector, digital transformation facilitated by Enterprise Resource Planning software helps in managing production processes, supply chain logistics, and inventory control more effectively. The software provides real-time insights into production schedules, inventory levels, and supply chain performance, enabling manufacturers to make informed decisions and respond quickly to market

demands. Similarly, in the retail industry, Enterprise Resource Planning software integrates sales, inventory, and customer relationship management, ensuring a seamless customer experience and efficient store operations.

The increasing focus on customer experience is also driving digital transformation in the Asia Pacific region. Consumers today expect personalized and seamless interactions with businesses, and organizations must adapt to these expectations to remain competitive. Enterprise Resource Planning software enables companies to better understand customer preferences, optimize supply chain management, and deliver products and services more efficiently. By integrating data from various sources, businesses can gain a holistic view of customer behavior and preferences, allowing them to tailor their offerings and marketing strategies accordingly.

Government initiatives promoting digitalization and smart technologies are further accelerating the adoption of Enterprise Resource Planning software. Countries such as China, India, and Japan are investing heavily in digital infrastructure and supporting businesses in their digital transformation journeys. These initiatives often include financial incentives, subsidies, and policy support for adopting advanced technologies, including Enterprise Resource Planning systems. As a result, organizations across the Asia Pacific region are increasingly turning to Enterprise Resource Planning software to drive their digital transformation efforts and stay ahead in a competitive market.

Growing Demand for Cloud-Based Enterprise Resource Planning Solutions

The demand for cloud-based Enterprise Resource Planning solutions is a significant driver of growth in the Asia Pacific Enterprise Resource Planning Software Market. Cloud computing has revolutionized the way organizations manage their operations by offering scalable, flexible, and cost-effective solutions that can be accessed from anywhere with an internet connection. The shift from traditional on-premises systems to cloud-based Enterprise Resource Planning solutions is driven by several factors, including cost efficiency, scalability, and remote accessibility.

One of the primary advantages of cloud-based Enterprise Resource Planning solutions is their scalability. As organizations grow and expand, their Enterprise Resource Planning needs may change. Cloud-based solutions allow businesses to easily scale their systems up or down to accommodate evolving requirements without the need for significant capital investments in hardware and infrastructure. This scalability is particularly beneficial for small and medium-sized enterprises in the Asia Pacific region, which may have limited financial resources but still require robust Enterprise Resource

Planning systems to manage their operations effectively.

Cost efficiency is another key factor driving the adoption of cloud-based Enterprise Resource Planning solutions. Cloud-based systems typically operate on a subscription-based model, allowing organizations to pay for the resources they use rather than making substantial upfront investments in hardware and software licenses. This pay-as-you-go approach is particularly appealing to small and medium-sized enterprises, which often face budget constraints but need powerful tools to compete in the market. By reducing the need for capital expenditures and ongoing maintenance costs, cloud-based Enterprise Resource Planning solutions enable businesses to allocate their financial resources more effectively and support their growth.

The flexibility offered by cloud-based Enterprise Resource Planning solutions is also a significant driver of market growth. Unlike traditional on-premises systems, which require substantial time and resources to implement and maintain, cloud-based solutions can be deployed quickly and easily. Organizations can choose from various deployment options, including public, private, and hybrid clouds, depending on their specific needs and preferences. This flexibility allows businesses to tailor their Enterprise Resource Planning systems to their unique requirements and adjust them as needed. Additionally, cloud-based solutions support remote work and digital collaboration, which has become increasingly important in the wake of the COVID-19 pandemic.

Data security is a critical consideration for organizations in the Asia Pacific region, and leading cloud service providers invest heavily in advanced security measures to protect their customers' data. Cloud-based Enterprise Resource Planning solutions offer robust security features, including encryption, multi-factor authentication, and regular security updates, ensuring that organizations' data is safeguarded against potential threats. This level of security is often more comprehensive than what organizations can achieve with on-premises systems, providing greater peace of mind and encouraging the adoption of cloud-based solutions.

Rising Focus on Real-Time Data and Analytics

The increasing emphasis on real-time data and analytics is a major driver of growth in the Asia Pacific Enterprise Resource Planning Software Market. In today's fast-paced business environment, organizations need to make informed decisions quickly to respond to changing market conditions, customer demands, and competitive pressures. Enterprise Resource Planning software provides a comprehensive platform for real-time

data access and analysis, enabling businesses to gain valuable insights into their operations and make data-driven decisions.

Real-time data access is essential for organizations to monitor their performance, track key metrics, and identify areas for improvement. Enterprise Resource Planning software integrates data from various business functions, including finance, supply chain, human resources, and customer relationship management, into a single system. This integration allows organizations to have a unified view of their operations, facilitating real-time monitoring and analysis of performance indicators. For example, in the manufacturing sector, Enterprise Resource Planning software provides real-time visibility into production schedules, inventory levels, and supply chain performance, enabling manufacturers to make timely adjustments and optimize their processes.

The ability to analyze real-time data is also crucial for identifying trends and opportunities. Enterprise Resource Planning software often includes advanced analytics and reporting tools that help organizations gain deeper insights into their operations. By leveraging these tools, businesses can analyze historical data, identify patterns, and forecast future performance. This capability is particularly valuable for strategic planning and decision-making, allowing organizations to anticipate market trends, optimize resource allocation, and improve overall performance.

The growing importance of customer experience is driving the demand for real-time data and analytics in the Asia Pacific region. Consumers today expect personalized and seamless interactions with businesses, and organizations must be agile and responsive to meet these expectations. Enterprise Resource Planning software enables companies to gather and analyze customer data from various touchpoints, providing insights into customer preferences, behavior, and satisfaction. This information allows businesses to tailor their offerings, improve customer service, and enhance overall customer experience.

Moreover, the increasing complexity of regulatory requirements in the Asia Pacific region is driving the need for real-time data and analytics. Organizations must ensure compliance with various regulations related to data privacy, environmental sustainability, and corporate governance. Enterprise Resource Planning software helps businesses monitor compliance, manage risks, and generate accurate reports, reducing the burden of regulatory compliance and enabling organizations to focus on their core activities..

Key Market Challenges

High Cost of Implementation and Customization

One of the primary challenges facing the Asia Pacific Enterprise Resource Planning Software Market is the high cost associated with the implementation and customization of Enterprise Resource Planning systems. For many organizations, particularly small and medium-sized enterprises, the financial burden of adopting Enterprise Resource Planning software can be substantial. The costs involved include not only the purchase of the software itself but also the expenses related to its implementation, customization, and ongoing maintenance.

The implementation of an Enterprise Resource Planning system requires significant investments in both time and resources. Organizations must allocate funds for purchasing the software licenses, investing in the necessary hardware and infrastructure, and hiring skilled professionals to oversee the implementation process. Additionally, businesses may need to modify their existing processes and workflows to align with the new system, which can further increase costs. Customization, which involves tailoring the software to meet the specific needs and requirements of the organization, is another major expense. Customization often involves complex programming and integration work, which can be costly and time-consuming.

The high cost of implementation and customization can be a significant barrier for small and medium-sized enterprises in the Asia Pacific region, which may have limited financial resources. These businesses may struggle to justify the investment in Enterprise Resource Planning software, particularly if they perceive it as a luxury rather than a necessity. As a result, they may be reluctant to adopt Enterprise Resource Planning solutions, hindering their ability to benefit from the efficiencies and competitive advantages that the software can offer.

Moreover, the ongoing maintenance and support costs associated with Enterprise Resource Planning systems can add to the overall financial burden. Organizations must invest in regular updates, security patches, and technical support to ensure that their systems remain functional and secure. These ongoing costs can be particularly challenging for small and medium-sized enterprises, which may have limited budgets for technology investments.

To address this challenge, some Enterprise Resource Planning software providers offer flexible pricing models, such as subscription-based or pay-as-you-go options, which can help reduce the upfront costs of adoption. Additionally, cloud-based Enterprise

Resource Planning solutions can provide a more cost-effective alternative to traditional on-premises systems, as they typically involve lower upfront investments and can be scaled according to the organization's needs.

Complexity of Integration with Existing Systems

Another significant challenge in the Asia Pacific Enterprise Resource Planning Software Market is the complexity of integrating Enterprise Resource Planning systems with existing legacy systems and applications. Many organizations in the region use a combination of legacy systems, disparate software applications, and manual processes to manage their operations. Integrating a new Enterprise Resource Planning system with these existing systems can be a complex and challenging process, requiring careful planning and execution.

Legacy systems, which are often outdated and not designed to work with modern Enterprise Resource Planning software, can present significant integration challenges. These systems may use different data formats, communication protocols, and software architectures, making it difficult to establish seamless connectivity with the new Enterprise Resource Planning system. Organizations may need to invest in middleware or custom integration solutions to bridge the gap between their legacy systems and the new software, adding to the overall complexity and cost of the integration process.

The complexity of integration can also be exacerbated by the need to synchronize data across different systems. Enterprise Resource Planning systems rely on accurate and consistent data to provide valuable insights and support decision-making. Integrating data from multiple sources, including legacy systems, third-party applications, and manual processes, can be a complex task that requires careful data mapping, cleansing, and transformation. Ensuring data accuracy and consistency throughout the integration process is critical to the success of the Enterprise Resource Planning implementation.

Additionally, organizations may face challenges related to change management and user adoption during the integration process. Employees who are accustomed to using legacy systems may resist transitioning to the new Enterprise Resource Planning software, particularly if they find the new system complex or difficult to use. Effective change management strategies, including training, communication, and support, are essential to ensuring a smooth transition and achieving successful integration.

To mitigate these challenges, organizations can work with experienced Enterprise

Resource Planning vendors and integration specialists who have a proven track record in managing complex integration projects. Leveraging industry best practices and adopting a phased approach to integration can also help streamline the process and reduce the risk of disruptions.

Key Market Trends

Increased Adoption of Artificial Intelligence and Machine Learning

One of the prominent trends in the Asia Pacific Enterprise Resource Planning Software Market is the increased adoption of Artificial Intelligence and Machine Learning technologies. These advanced technologies are revolutionizing the way Enterprise Resource Planning systems operate, enhancing their capabilities and providing businesses with powerful tools to optimize their operations. Artificial Intelligence and Machine Learning algorithms enable Enterprise Resource Planning systems to analyze vast amounts of data, identify patterns, and make predictive insights that drive better decision-making.

Artificial Intelligence is being integrated into Enterprise Resource Planning software to automate routine tasks such as data entry, process management, and customer service. This automation not only reduces the manual workload for employees but also improves accuracy and efficiency. Machine Learning, on the other hand, enhances the software's ability to forecast trends, optimize inventory management, and personalize customer experiences. For example, Machine Learning algorithms can predict future demand for products based on historical sales data and market trends, helping businesses optimize their inventory levels and reduce stockouts or overstock situations.

The adoption of Artificial Intelligence and Machine Learning is also driving innovations in data analytics and reporting. Enterprise Resource Planning systems equipped with these technologies can provide real-time insights into various business functions, such as financial performance, supply chain efficiency, and customer behavior. These insights enable organizations to make data-driven decisions, improve operational efficiency, and gain a competitive edge in the market.

As businesses in the Asia Pacific region seek to leverage the benefits of Artificial Intelligence and Machine Learning, Enterprise Resource Planning software providers are increasingly incorporating these technologies into their solutions. This trend is expected to continue as organizations strive to stay ahead in a rapidly evolving digital landscape.

Growing Preference for Cloud-Based Solutions

The growing preference for cloud-based solutions is a significant trend in the Asia Pacific Enterprise Resource Planning Software Market. Cloud-based Enterprise Resource Planning systems are gaining traction among businesses due to their scalability, flexibility, and cost-effectiveness. Unlike traditional on-premises systems, cloud-based solutions are hosted on remote servers and accessed via the internet, eliminating the need for extensive hardware and infrastructure investments.

One of the key advantages of cloud-based Enterprise Resource Planning solutions is their scalability. Businesses can easily adjust their software resources based on their changing needs, whether they are expanding, downsizing, or entering new markets. This flexibility allows organizations to scale up or down without incurring significant costs or experiencing disruptions in their operations.

Cost-effectiveness is another major factor driving the preference for cloud-based Enterprise Resource Planning solutions. Cloud-based systems typically operate on a subscription-based model, allowing businesses to pay for the resources they use rather than making substantial upfront investments in hardware and software licenses. This pay-as-you-go approach is particularly appealing to small and medium-sized enterprises, which may have limited budgets but require robust Enterprise Resource Planning systems to manage their operations effectively.

Cloud-based solutions also offer enhanced accessibility and collaboration. With cloud-based Enterprise Resource Planning systems, employees can access the software from anywhere with an internet connection, facilitating remote work and improving collaboration among geographically dispersed teams. This capability is increasingly important in today's global business environment, where organizations need to stay connected and responsive to market demands.

As businesses in the Asia Pacific region continue to embrace digital transformation, the demand for cloud-based Enterprise Resource Planning solutions is expected to grow. Cloud technology providers are constantly innovating and improving their offerings, further driving the adoption of cloud-based Enterprise Resource Planning systems in the region.

Focus on Enhancing User Experience and Usability

Enhancing user experience and usability is becoming a key trend in the Asia Pacific Enterprise Resource Planning Software Market. As organizations invest in Enterprise Resource Planning systems, there is a growing emphasis on ensuring that these systems are user-friendly and intuitive. Improving user experience and usability is critical for maximizing the effectiveness of Enterprise Resource Planning software and ensuring that employees can efficiently navigate and utilize the system.

Enterprise Resource Planning software providers are increasingly focusing on designing interfaces that are easy to use and visually appealing. Modern Enterprise Resource Planning systems feature streamlined, intuitive interfaces that simplify navigation and reduce the learning curve for users. These user-friendly designs help minimize the time and effort required for employees to adapt to the system, leading to faster adoption and improved productivity.

Another aspect of enhancing user experience is the integration of self-service features and personalized dashboards. Self-service capabilities allow users to customize their dashboards, access relevant information, and generate reports without relying on IT support. This level of customization empowers employees to tailor the system to their specific needs and preferences, improving their overall experience and efficiency.

User experience is also being enhanced through the incorporation of mobile and remote access features. With the increasing use of mobile devices and the rise of remote work, businesses require Enterprise Resource Planning systems that can be accessed on smartphones and tablets. Mobile-friendly interfaces and applications enable employees to perform tasks, access data, and make decisions on the go, providing greater flexibility and convenience.

As the Asia Pacific Enterprise Resource Planning software market evolves, the focus on enhancing user experience and usability is expected to remain a priority. Providers will continue to invest in designing intuitive interfaces, self-service features, and mobile access to meet the needs of modern businesses and ensure that their Enterprise Resource Planning systems deliver maximum value.

Segmental Insights

Deployment Insights

In 2023, the cloud deployment segment dominated the Asia Pacific Enterprise Resource Planning Software Market and is expected to maintain its dominance during the forecast

period. The shift towards cloud-based solutions has been driven by the growing demand for scalable, flexible, and cost-effective systems that enable organizations to manage their operations more efficiently. Cloud-based Enterprise Resource Planning software offers significant advantages over traditional on-premises systems, including lower upfront costs, easier implementation, and the ability to access the software from any location with an internet connection. These benefits are particularly appealing to small and medium-sized enterprises in the Asia Pacific region, which may lack the financial and technical resources required for on-premises systems. Additionally, the rising trend of remote work and digital collaboration, further accelerated by the COVID-19 pandemic, has increased the demand for cloud-based solutions that support real-time data access and seamless integration across departments. As a result, more organizations are transitioning to cloud-based Enterprise Resource Planning software to enhance their operational efficiency, agility, and decision-making capabilities. Moreover, the ongoing advancements in cloud technology, such as enhanced security features and integration with emerging technologies like artificial intelligence and data analytics, are expected to further strengthen the appeal of cloud-based Enterprise Resource Planning solutions. Consequently, the cloud deployment segment is projected to continue its strong growth trajectory, solidifying its dominance in the Asia Pacific Enterprise Resource Planning Software Market throughout the forecast period.

Regional Insights

In 2023, China dominated the Asia Pacific Enterprise Resource Planning Software Market and is expected to maintain its dominance during the forecast period. The market's growth in China is driven by the country's rapid economic expansion, robust industrial base, and the increasing adoption of digital technologies across various sectors. As China continues to position itself as a global leader in manufacturing, finance, and technology, the demand for integrated business solutions like Enterprise Resource Planning software has surged. Chinese enterprises, ranging from large corporations to small and medium-sized businesses, are increasingly investing in Enterprise Resource Planning software to streamline their operations, improve efficiency, and gain a competitive edge in both domestic and international markets. Government initiatives aimed at promoting digitalization, smart manufacturing, and Industry 4.0 are further accelerating the adoption of Enterprise Resource Planning software in China. Additionally, the country's significant investments in cloud infrastructure have made cloud-based Enterprise Resource Planning solutions more accessible and attractive to businesses, contributing to the strong growth of this segment. The presence of numerous local and international Enterprise Resource Planning software providers in China also enhances the market's competitive

landscape, driving innovation and offering businesses a wide range of solutions tailored to their specific needs. Given these factors, China is expected to continue leading the Asia Pacific Enterprise Resource Planning Software Market, reinforcing its dominance throughout the forecast period..

Key Market Players

Sage Group plc.

SAP SE.

Oracle Corporation

Microsoft Corporation

Infor Inc

Workday, Inc

Epicor Software Corporation.

IFS World Operations AB

SYSPRO Proprietary Limited

Acumatica, Inc.

Report Scope:

In this report, the Asia-Pacific ERP Software Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Asia-Pacific ERP Software Market, By Deployment:

On-premises

Cloud

Asia-Pacific ERP Software Market, By Organization Size:

Small & Medium Enterprises (SMEs)

Large Enterprises

Asia-Pacific ERP Software Market, By Business Function:

Finance

Human Resource

Supply Chain

Customer Management

Inventory Management

Others

Asia-Pacific ERP Software Market, By Industry Vertical:

Manufacturing

Retail

Healthcare

BFSI (Banking, Financial Services, & Insurance)

IT & Telecom

Government & Public Sector

Education

Others

Asia-Pacific ERP Software Market, By Country:

China

Japan

India

South Korea

Australia

Singapore

Thailand

Malaysia

Rest Of Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Asia-Pacific ERP Software Market.

Available Customizations:

Asia-Pacific ERP Software Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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